

Are you counting your PTA's volunteer hours?

Please remember to keep track of your PTA's volunteer hours. These hours are used to help keep PTA's status as a non-profit organization.

What type of activities should you keep track of?

Phone calls

Travel time

Meeting time

- General Membership meetings
- Executive Board meetings
- Meetings with Teachers/Administration having to do with PTA
- Any other meetings attended for PTA purposes

Preparation Time

- for meetings
- for events
- phone calls/e-mails

Set up/Clean up

Actual Event

Shopping for event/activity

Thinking PTA

Promoting PTA to friends and acquaintances

Volunteering at school for PTA administered programs

E-mail conversations

Writing

- agendas
- minutes
- treasurer's reports
- chair/vp reports

California State PTA Convention

National Convention

Council/District Trainings

Legislation activities/conferences

If PTA asks you to do it – count it toward your volunteer hours

Reports are due to your council/district during May, please check for the exact due date. Thank you for all the volunteer hours you put in for the children in California.

Using the Volunteer Tally Sheet

The Volunteer Tally sheet helps the Historian of the PTA/PTSA unit, council or district to collect the hours its members expend in their PTA-related work and activities. The best practice is to circulate this form during board meetings so each member present can report their hours. At the end of the PTA year, the unit Historian reports the total volunteer hours in the Unit Annual Report and submits it to the PTA council and district. The council and district PTAs then include these in their annual reports to the California State PTA.

What hours should be included in the Tally Sheet?

Volunteer hours should include participation in school and community service or activities benefiting children, unit, council, district, state and National PTA programs, projects, training, and PTA-related travel, phone, meetings, paperwork time. The hours after the school year ends through June 30th should be projected in the annual report.

Where do you report events and activities?

Events and activities during the year that benefit the children may be included in the narrative portion of the Annual Report.

Why do we collect and report Volunteer Hours?

- The California State PTA requires filing of annual reports in accordance with unit, council and district PTA bylaws.
- The collection of hours is important in maintaining PTA's federal tax exemption status. An organization granted nonprofit charitable status must receive one-third of its support from the general public.
- In addition, information on this report is used for advocacy and program planning purposes.
- Valuation of service hours expended in carrying out the purposes for which it was formed will positively affect the public support ratio of PTA.

For more information, see the Toolkit or the California State PTA website at www.capta.org, or email your questions to historian@capta.org.



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VOLUNTEER TALLY SHEET

NAME OF PTA VOLUNTEER	VOLUNTEER HOURS												TOTAL
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													
19													
20													

ANNUAL UNIT HISTORIAN REPORT FORM

REPORTING PERIOD: JULY 1 to JUNE 30

Instructions

1. District PTA number/name _____
2. Complete this form (front and back) and make TWO copies
3. File ONE copy in unit Historian's procedure book

Send TWO copies to your council

Council Name _____

Council Address _____

Council Due Date _____

OR, if out-of-council, send TWO copies to your District PTA

PTA District Address _____

PTA District Due Date _____

**DO NOT SEND
THIS REPORT TO
THE CALIFORNIA
STATE PTA OFFICE
SEND THROUGH
PTA CHANNELS**

UNIT INFORMATION

NAME OF PTA/PTSA _____

Pre-school Elem. Jr./Middle High

PRESIDENT'S NAME _____

PRESIDENT'S SIGNATURE _____

DATE _____

STATE PTA IDENTIFICATION # _____
(Number on label of mailings from California State PTA)

HISTORIAN, or person making report _____

Address of above _____

City, Zip _____

Phone/Fax _____

TOTAL UNIT VOLUNTEER HOURS REPORTED _____

The California State PTA requires filing of annual reports in accordance with unit, council and district PTA bylaws. Information on this report is used for advocacy and program planning purposes. Please total your unit members' volunteer hours (which should be projected through June 30). These should include participation in school and community service or activities benefiting children, unit, council, district, state and National PTA programs, projects, training, and PTA-related travel, phone, meetings, paperwork time. Then complete the backside of this report. Provide Secretary with a copy of this report.

